

Segall Bryant & Hamill Names Zachary Rosenstock as Assistant Portfolio Manager

CHICAGO, February 18, 2021/--Segall Bryant & Hamill (SBH), an investment management firm headquartered in Chicago, announced today the promotion of Zachary Rosenstock, CFA, to Assistant Portfolio Manager on the firm's Small Cap ROIC team. Specifically, Mr. Rosenstock will become the Assistant Portfolio Manager of the team's Small Cap Core and SMID Cap investment strategies. Mr. Rosenstock has been a Senior Equity Analyst on the team since 2011 and has 16 years of investment experience.

In this role, Mr. Rosenstock will expand his responsibilities to include portfolio strategy and client and consultant communications. He will continue to primarily focus on the technology sector but will also broaden his research coverage to assist with other sectors.

"For nearly a decade, Zach has been an outstanding teammate and key member of our team through his coverage of the technology sector," said Jeffrey Paulis, CFA, Principal, Senior Portfolio Manager, and Lead Portfolio Manager of the SBH Small Cap Core and SMID Cap strategies. "In his expanded role, we're excited to broaden the use of Zach's skill set within our investment strategies and with our clients and consultant partners."

The investment philosophy of the SBH Small Cap ROIC team is based on the belief that high and improving Return on Invested Capital (ROIC) levels are important drivers of long-term outperformance in the small cap universe. The team seeks to combine this ROIC approach within niche market focused companies that have defendable competitive advantages. Investment opportunities at SBH that follow this philosophy include the Small Cap Core and SMID Cap strategies.

About Segall Bryant & Hamill

Segall Bryant & Hamill is an independent investment firm headquartered in Chicago, with offices in Denver, Philadelphia, St. Louis, and Naples, Florida. The firm was established in 1994 and had over \$23 billion* in assets under management/assets under advisement as of December 31, 2020. SBH offers a range of investment strategies and customized solutions for institutional, advisor and wealth management clients, including domestic, international, and global equity; fixed income; and alternatives.

SBH is a signatory of the United Nations' Principles for Responsible Investment (PRI). Signing the internationally recognized PRI shows the firm's commitment to responsible investment within a global community, seeking companies that exhibit positive stewardship in their environmental, social, and corporate governance practices.

For more information, please visit www.sbhic.com.

* Model UMA assets of approximately \$209 million are included in the AUA portion of the AUM/AUA total as of December 31, 2020.

On January 25, 2021, CI Financial Corp. (“CI”) (TSX: CIX; NYSE: CIXX), a diversified global asset and wealth management company and Segall Bryant & Hamill announced an agreement under which CI will acquire SBH. The deal is expected to close in the second quarter of 2021, subject to regulatory, stock exchange and other customary closing conditions.

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